

ANZ KIWISAVER SCHEME

TRANS-TASMAN TRANSFER APPLICATION FORM

Australia to New Zealand



Post this form and supporting evidence to the trustee of your Australian complying superannuation fund. You may need to visit your Australian provider's website to find their contact details.

1. YOUR INFORMATION

Australian fund name					
Australian fund membership number					
ANZ KiwiSaver Scheme investor number					
IRD number					
<input type="checkbox"/> Mr	<input type="checkbox"/> Miss	<input type="checkbox"/> Mrs	<input type="checkbox"/> Ms	<input type="checkbox"/> Other	
First name(s)					
Surname					
New Zealand residential address				Postcode	
Contact number					
Email					
Last known address in Australia				Postcode	
Date of birth	D D	M M	Y Y Y Y		
Gender	<input type="checkbox"/> Male	<input type="checkbox"/> Female			
Date of permanent emigration to New Zealand	D D	M M	Y Y Y Y		

2. KIWISAVER SCHEME DETAILS

KiwiSaver scheme name	ANZ KiwiSaver Scheme
KiwiSaver scheme registration number	KSS10030
KiwiSaver provider name	ANZ New Zealand Investments Limited
KiwiSaver provider postal address	PO Box 7149, Wellesley Street, Auckland 1141
KiwiSaver provider email address	service@anzinvestments.co.nz
Phone number	+64 9 356 4000

Please pay funds into the following Australian dollar bank account:

Bank SWIFT	ANZBNZ22
Bank name and address	ANZ Bank New Zealand Limited, Wellington
Beneficiary name	The NZ Guardian Trust Co Ltd as Trustee of ANZ KiwiSaver A/C
Beneficiary address	Level 17, ANZ Centre, 23-29 Albert Street, Auckland 1010
Beneficiary account number	218410AUD00001
Remittance instructions	Member's name and KiwiSaver scheme investor number
Alternatively, please make your cheque payable to	ANZ KiwiSaver Scheme Please write the member's name and KiwiSaver scheme investor number on the back of your cheque.

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3. STATUTORY DECLARATION

Dear Australian complying superannuation fund provider

The Superannuation Laws Amendment (2014 Measures No. 1) Regulation 2014 was passed on 21 August 2014, allowing Australian superannuation funds to accept a New Zealand statutory declaration as evidence that an individual has permanently emigrated to New Zealand.

ANZ New Zealand Investments Limited has prepared the following New Zealand statutory declaration to help our KiwiSaver members apply to bring their Australian retirement savings to New Zealand.

If you have any questions please contact us at service@anzinvestments.co.nz

I	Full name of the person making the declaration	
of	Address	
		Postcode
and	Occupation	

solemnly and sincerely declare that:

1. I emigrated permanently to New Zealand as noted in section 1 of this form.
2. My current place of residence in New Zealand is the address noted in section 1 of this form.
3. I have opened a ANZ KiwiSaver Scheme account.
4. I request and consent to a full withdrawal from my Australian complying superannuation fund detailed in section 1 of this form, to be paid to my ANZ KiwiSaver Scheme account.
5. I discharge the trustee of my Australian complying superannuation fund of all further liability in respect of the benefits paid and transferred to my ANZ KiwiSaver Scheme account.
6. I understand that the withdrawal amount from my Australian complying superannuation fund will be paid in Australian dollars and that the exchange rate between Australian and New Zealand dollars at the time my Australian savings are converted will affect the amount that is credited to my ANZ KiwiSaver Scheme account.
7. I am aware I can ask my Australian complying superannuation fund for information about any fees or charges that may apply, or any other information about the effect of this transfer.

And I make this solemn declaration conscientiously believing the same to be true and by virtue of the Oaths and Declarations Act 1957 (New Zealand).

Signature of the person making the declaration

Declared at	this	day of	20
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Before me: (full name, address, occupation and signature of the person in front of whom the declaration is made)

Full name	
Address	
	Postcode
Occupation	
Signature of the person taking the declaration	

People who can take statutory declarations in New Zealand:

- Person who is enrolled as a barrister and solicitor of the High Court
- Justice of the Peace
- Notary public
- Registrar or Deputy Registrar of the Supreme Court, High Court, a District Court or Court of Appeal
- Any other person authorised by law to take statutory declarations.

Note: ANZ branch staff can't take statutory declarations

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4. CONFIRMATION OF ACCEPTANCE

Provided the withdrawal amount doesn't include a returning New Zealand amount, ANZ New Zealand Investments Limited ('ANZ Investments'), will accept the withdrawal amount from your Australian complying superannuation fund.

5. CHECKLIST

Make sure you send your Australian complying superannuation fund everything listed below as they can't consider your request without the following. They may also require further information from you.

- Your completed application
- Your original statutory declaration signed by you and taken by a person who can witness Commonwealth statutory declarations (see section 3)
- Evidence that you live permanently in New Zealand, for example, a utility bill in your name issued in the last three months
- Certified copy of your passport or driver licence. The person who takes your statutory declaration can also certify your identification (a fee may be payable).

Things you need to consider when transferring your superannuation: When you transfer your super, your entitlement under that fund will cease. You need to consider all relevant information before you make a decision to transfer your super. If you ask for information, your Australian complying super fund must give it to you. Some of the points you may consider are:

- **Fees** – your transferring fund must give you information about any exit or withdrawal fees. If you are not aware of the fees that may apply, you should contact your fund for further information before completing this application form. The fees could include administration fees as well as exit or withdrawal fees. Your receiving fund may also charge entry or deposit fees on transfer. Differences in the fees funds charge can have a significant effect on what you will have to retire on. For example, a 1% increase in fees may significantly reduce your final benefit.
- **Death and disability benefits** – your transferring fund may insure you against death, illness or an accident that leaves you unable to return to work. If you choose to leave your current fund, you may lose any insurance entitlements you have. KiwiSaver schemes do not generally provide insurance of their members, and you will therefore need to seek any insurance you need separately.
- **Tax** – the tax treatment of Australian superannuation schemes and KiwiSaver schemes are different. The ways in which your savings are taxed, and the applicable rates, are different.

 Email service@anzinvestments.co.nz if you have any questions.

Please provide this letter to your Australian complying superannuation fund provider along with a completed application form and required documentation

Dear Australian complying superannuation fund provider

Trans-Tasman retirement savings portability

Please find enclosed an application form and New Zealand statutory declaration that ANZ New Zealand Investments Limited (ANZ Investments) has prepared to help our ANZ KiwiSaver Scheme members apply to bring their Australian retirement savings to New Zealand. ANZ Investments is the issuer and manager of the ANZ KiwiSaver Scheme and accepts withdrawals transferred from an Australian complying superannuation fund, provided all the requirements are met.

To implement the trans-Tasman retirement savings portability initiative, the Australian Government has passed the Superannuation Industry (Supervision) Amendment Regulation 2013 (No.3). This Regulation amends the Superannuation Industry (Supervision) Regulations 1994 (**SIS Regulations**) by inserting a new Part 12A into the SIS Regulations with effect from 1 July 2013.

Under Part 12A, Division 3 of the SIS Regulations, the trustee of a complying superannuation fund must, subject to limited exceptions, pay the whole of a member's withdrawal benefit to a KiwiSaver scheme within 30 days, when the trustee is satisfied that the matters listed in sub regulation 12(A) 10.3 of the SIS Regulations have been met.

The Australian Government has subsequently passed the Superannuation Laws Amendment (2014 Measures No. 1) Regulation 2014. This regulation amends regulation 12A.10 so that statutory declarations made under New Zealand law satisfy the provisions.

The enclosed form (incorporating the New Zealand statutory declaration) has been developed to provide all necessary information for a trustee to make a payment to a KiwiSaver scheme in accordance with Part 12A, Division 3 of the SIS Regulations, and the Superannuation Laws Amendment (2014 Measures No. 1) Regulation 2014.

Please review the attached application form and supporting evidence for our respective member.

Yours sincerely

A handwritten signature in black ink, appearing to read 'Ana-Marie Lockyer'.

Ana-Marie Lockyer
General Manager Funds & Insurance

Issuer and manager: ANZ New Zealand Investments Limited